



User Guide

Patient Visibility Functionality

Docman 10

Author: Charlotte Wood
Date: 28/01/2021
Doc Version: 4

Advanced Computer Software Group Ltd.
Ditton Park, Riding Court Road, Datchet, Berkshire. SL3 9LL
t: 0845 160 6162 (+44 845 160 6162) | f: +44 (0) 1932 584001

www.oneadvanced.com

Copyright © Advanced Computer Software Group Ltd 2021

This document contains confidential and / or proprietary information. The content must not be disclosed to third parties without the prior written approval of Advanced Computer Software Group Limited or one of its subsidiaries as appropriate (each referred to as “Advanced”). External recipients may only use the information contained in this document for the purposes of evaluation of the information and entering into discussions with Advanced and for no other purpose.

Whilst Advanced endeavours to ensure that the information in this document is correct and has been prepared in good faith, the information is subject to change and no representation or warranty is given as to the accuracy or completeness of the information. Advanced does not accept any responsibility or liability for errors or omissions or any liability arising out of its use by external recipients or other third parties.

No information set out or referred to in this document shall form the basis of any contract with an external recipient. Any external recipient requiring the provision of software and/or services shall be required to enter into an agreement with Advanced detailing the terms applicable to the supply of such software and/or services and acknowledging that it has not relied on or been induced to enter into such an agreement by any representation or warranty, save as expressly set out in such agreement.

The software (if any) described in this document is supplied under licence and may be used or copied only in accordance with the terms of such a licence. Issue of this document does not entitle an external recipient to access or use the software described or to be granted such a licence.

The development of Advanced software is continuous and the published information may not reflect the current status. Any particular release of the software may not contain all of the facilities described in this document and / or may contain facilities not described in this document.

Advanced Computer Software Group Limited is a company registered in England and Wales with registration number 05965280 whose registered office is at Ditton Park, Riding Court Road, Datchet, Berkshire. SL3 9LL.

A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy

Version History

Date	Version	Issued By	Changes
08/01/2021	1.4	Charlotte Wood	Updates made following review
28/01/2021	1.5	Charlotte Wood	Addition of EMIS Help link

Version Approval

Version	Name	Title / Organisation	Approval Record
1.5	Allun Williams	Head of Product Management – Advanced	
1.5	Dr Stephen Miller	Clinical Director - NHS Digital	

Distribution

Date	Version	Name	Title

Document Control

Filename	Location	Minimum Retention
Docman 10 Patient Visibility User Guide 1.5		

Contents

Introduction.....	2
Filing and workflowing documents in Docman 10	2
Filing – no workflow required.....	2
Filing – workflow required / review required for decision on visibility.....	3
Audit in Docman 10.....	6

Introduction

New features have been created to enable documents filed from Docman, to be made invisible to patients through Online Services.

Users will be able to make a decision at the point of filing or in workflow as to whether the document should be made visible or if they would like to prevent the visibility to the patient.

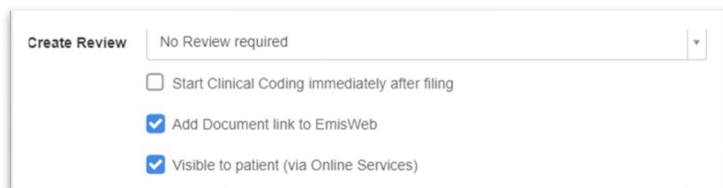
Please read this user guide to understand how to use the new features in Docman 10. Filing and workflowing documents in Docman 10

Filing and workflowing documents in Docman 10

Filing – no workflow required

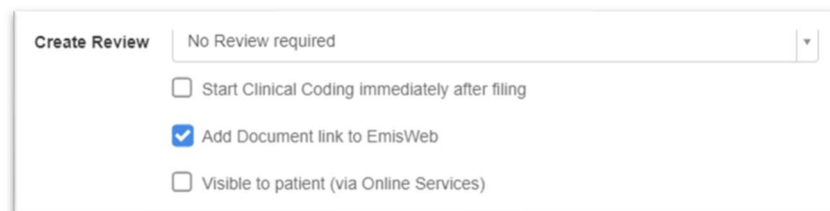
When a document is filed in Docman with 'No Review required' and the 'Add Document link to EmisWeb' tick box is selected, users will be presented with a new option: **Visible to patient (via Online Services)**.

By default, the Visible to patient tick box is selected.



The screenshot shows a 'Create Review' form with a dropdown menu set to 'No Review required'. Below the dropdown are three checkboxes: 'Start Clinical Coding immediately after filing' (unchecked), 'Add Document link to EmisWeb' (checked), and 'Visible to patient (via Online Services)' (checked).

Users must deselect the Visible to patient tick box if they wish to prevent the document being made visible to the patient. (Once a decision has been made in Docman if a change to the visibility is required, this must be actioned within EMIS see [EMIS Web Knowledge Base](#) for guidance).



The screenshot shows the same 'Create Review' form as above, but the 'Visible to patient (via Online Services)' checkbox is now unchecked.

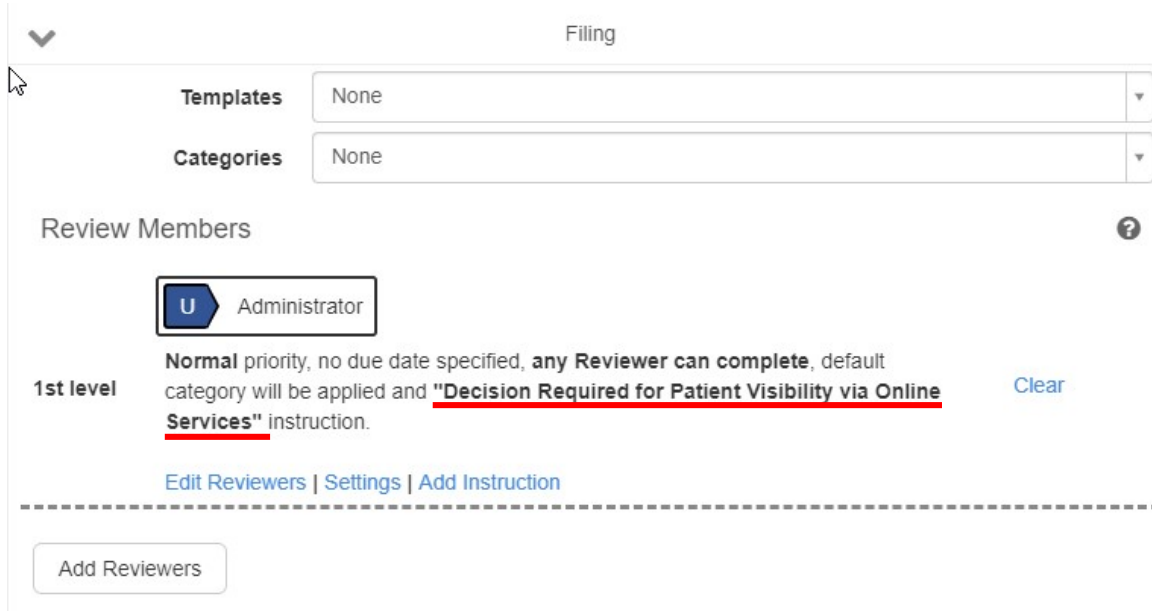
If the user prevents visibility to the patient, the icon below will display in EMIS against the document entry.



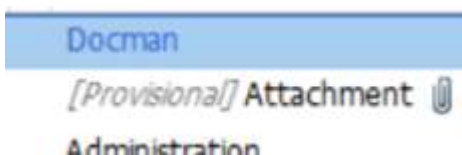
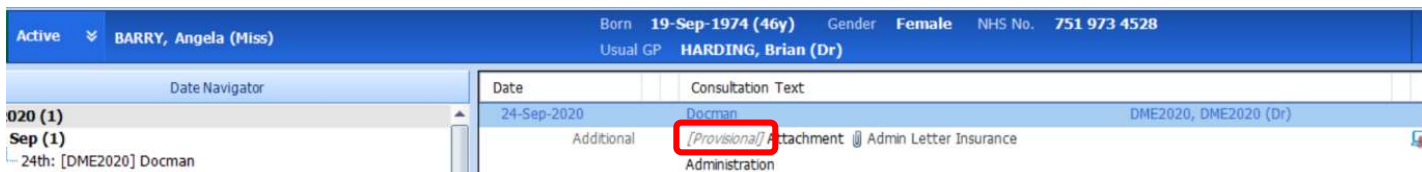
Filing – workflow required / review required for decision on visibility

If a user is not authorised or is unable to make a decision regarding online visibility, they have the option to send the document in a review task to another user to action as appropriate.

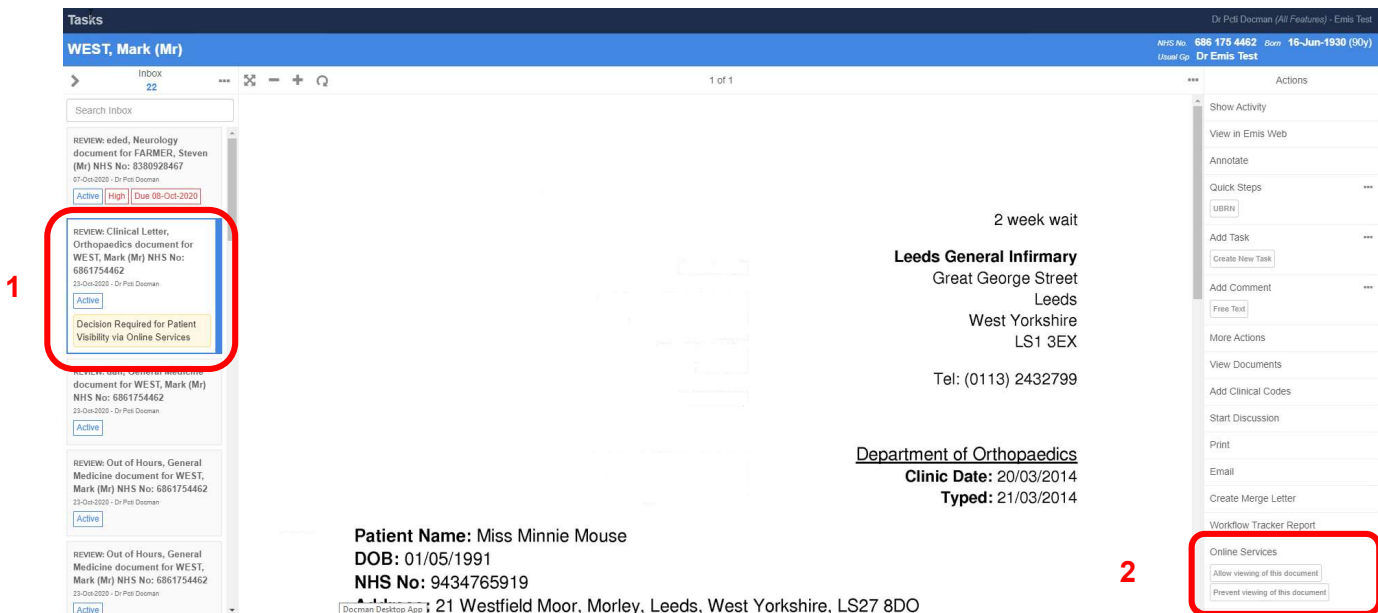
It is advised that the user should add an instruction to the task to inform the recipient that a decision is required for patient visibility via online services. (*See below for guidance for adding new instructions)

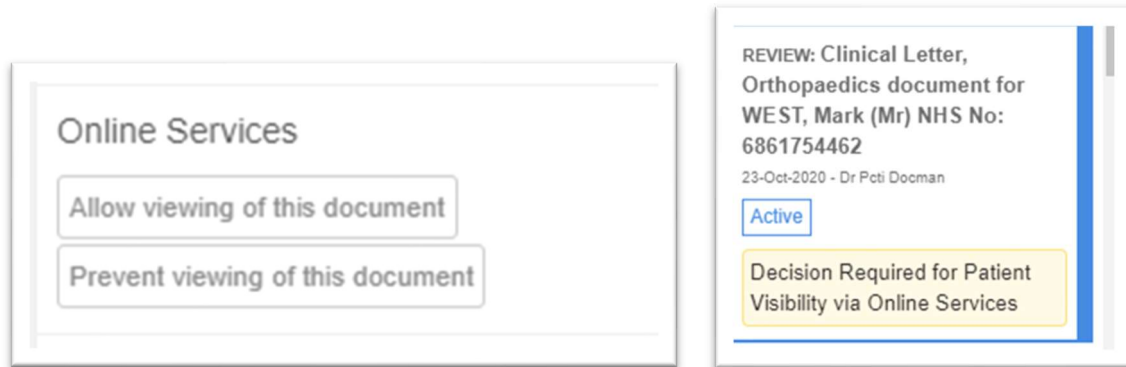


As the document has been sent on for review, the entry in EMIS is marked as provisional and the document is not visible to the patient.



1. When the task recipient clicks on the task, the instruction will display on the task card
2. The task recipient is presented with the ability to allow or prevent visibility. If a decision is made, no other user in the workflow can make a decision in Docman. If no selection is made and they are the final user in the review task workflow, by default the document will be made visible





Workflow / Tasks in Docman 10

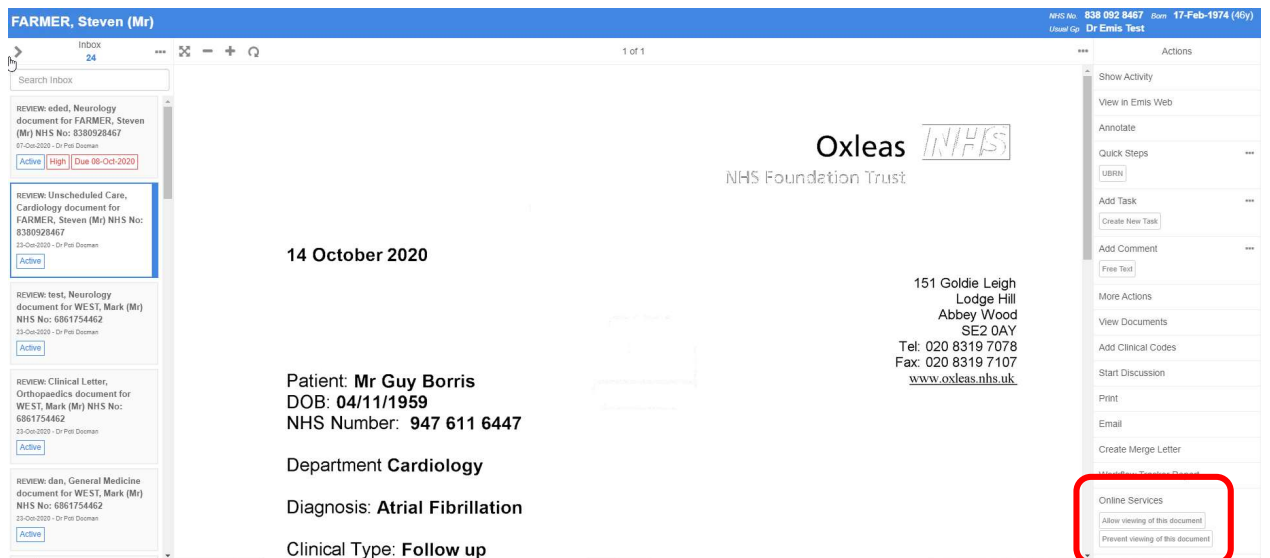
When a document is sent in a task/workflowed in Docman and the 'Add Document link to EmisWeb' tick box is selected, the filer will not have the option to make a decision on the visibility.

The task recipient will be presented with a new option in the actions pane: **Online services – Allow viewing of this document or Prevent viewing of this document.**

The task/workflow recipient is presented with the ability to allow or prevent visibility.

If a decision is made, no other user can change the visibility setting from within Docman.

If no selection is made and the user is the final recipient in the workflow, by default the document will be made visible to the patient, although this can still be changed at this point if that is the desired outcome.



Audit in Docman 10

The audit will record the decision made on patient visibility in the document history section.

Document History

WEST, Mark (Mr)

Timeline ⋮

- 23-Oct-2020
09:32

Administrator
Emis Patient Visibility
 Document has been set as viewable for patient in Emis Web
- 09:32

Administrator
Document Filed
- 09:32

Administrator
Document Filed to Clinical System
 Seen in general medical clinic - 185241003
- 09:31

Administrator
Document Added

Document History

KENT, Leslie (Mr)

Timeline ⋮

- 23-Oct-2020
15:47

Dr Pcti Docman
Emis Patient Visibility
 Document has not been set as viewable for patient in Emis Web
- 15:47

Dr Pcti Docman
Created
 Document Review
 Members: Dr Pcti Docman
 Instruction: Decision Required for Patient Visibility via Online Services
- 15:47

Dr Pcti Docman
Emis Patient Visibility
 Document has not been set as viewable for patient in Emis Web
- 15:47

Dr Pcti Docman
Document Filed
- 15:47

Dr Pcti Docman
Document Filed to Clinical System
- 15-Sep-2020
14:30

SYSTEM
Document Added